



Release Notes

Producer Lifecycle Management™ (Producer Manager™/Producer Express™)

Version: 6.0

Production Release Date: May 19, 2012

Overview

Producer Lifecycle Management (PLM) version 6.0 will be released to the production environment on May 19, 2012.

The following are highlights of the changes in this production release:

- Improved support for DTCC transactions
- New functionality to allow manual entry of third-party certifications

Training

Vertafore presented a training webinar on the highlights of this release. To view a recording of the webinar, use the following links:

- <https://vertafore.webex.com/vertafore/ldr.php?AT=pb&SP=MC&rID=46379087&rKey=f81b807c633c7107> (streaming video)
- <https://vertafore.webex.com/vertafore/lsr.php?AT=dw&SP=MC&rID=46379087&rKey=10645bb1e1df2b79> (downloadable video).

The video runs about 10 minutes.

Enhancements

The following are detailed descriptions of the specific enhancements in this production release:

DTCC Integration

- **Improved Support for Training Update (TU) Transactions:** Previously, when Producer Express processed a DTCC TU request, and a record for the producer associated with the request was not found in Producer Manager, the transaction would be sent immediately to the Producer Express error queue.

Now, under these circumstances the request will enter a "Pending" state, and the system will automatically attempt to re-process the request once per day for 30 days. If after 30 days a record for the producer still is not available in Producer Manager, the request will be routed to the Producer Express error queue. [MKT-9197]

Note: If your company is interested in learning more about Vertafore's DTCC transaction support, please contact your Vertafore sales representative.

Education & Training

- **Manual Third-Party Certifications:** To help reflect the most accurate picture of a producer's education status, now you can manually add, edit, or delete a third-party training certification for a producer in Producer Manager.

To add a new third-party certification to a producer record in Producer Manager, in the Third Party Certifications data section on the Review/Update Producer page, click the Add/Update/Delete Third Party Certifications link. Then, on the new Maintain Third Party Certifications page, you can manually maintain third-party certification information and save it to the producer's record. [MKT-9345]

Also, when configuring a credential program in Producer Manager, you can add manually created third-party certifications as program requirements. [MKT-9346]

Finally, due to the above changes, a Sircon Example credential program now can be satisfied either with manually entered third-party certifications or ClearCert certifications, obtained automatically from Compliance Certification Clearinghouse, LLC. Previously Sircon Example credential programs accepted only ClearCert certifications as program requirements. [MKT-9355]

Notes: The Third Party Certifications data section must be enabled in user security roles by a system administrator. ClearCert certifications are available only to Vertafore customers who also are ClearCert subscribers.

- **New Education Credential Program Templates:** New education credential program templates are available for all Long-Term Care (LTC) suitability states. Because there are now a significant number of credential program templates to choose from, we have redesigned the Credential Programs page in Producer Manager. When creating a new credential program, now you can choose a program template from a dropdown menu instead of from an array of radio buttons. [MKT-9355]

Producer Onboarding

- **Uploaded File Name Customization:** Now you have more control over document file names that are part of a Producer Express workflow and are made available to internal imaging systems through the Transaction Image Web Service. Workflow configuration options now allow additional information to be added or appended to a document file name that is included in a request packet, allowing home office users to more easily classify and organize these documents by name.

File name update options include the following:

- Add a pre-defined prefix to a file name
- Add a pre-defined suffix to a file name
- Replace a file name with a preset value
- Replace a file name with a value from a previously entered packet field
- Append a timestamp to a file name. [MKT-9109]

Note: To take advantage of this enhancement, please contact your Vertafore sales representative.

- **Regulatory Mappings:** The Regulatory Mappings page now includes a Date field to allow you to view historical mappings, as well as any upcoming mappings in the system. The Regulatory Mappings page is available through Administration > Configure System > View Regulatory Mappings. [MKT-9498]

Bug Fixes

The following is a log of bugs that have been fixed in production since the last PLM release:

- An error would be displayed on the Producers with Missing Information page in Producer Manager if there were no results. [MKT-9015]
- Error messages in Producer Manager were rendering inconsistently across pages. [MKT-8612]
- Producer Manager was incorrectly preventing users from deleting a producer with a third-party certification attached to his or her producer record. [MKT-8888, MKT-9314]
- The Data Reconciliation Requests page in Producer Manager was not displaying if a producer had a pending automated data reconciliation involving ClearCert certifications in progress. [MKT-9295]
- The State Registered column heading of the Individual Associations Inquiry was labeled incorrectly. [MKT-9194]
- When checking for duplicate DTCC transactions, Producer Express was not looking for requests that were on hold. [MKT-9341]
- When exporting certain reports to Excel in Producer Manager, users were incorrectly prompted to re-enter their usernames and passwords. [MKT-9167]
- The New Producer Inquiry was always listing Business Address as a column heading, even when the preferred address was a mailing or home address. The report now lists Preferred Address as a column heading instead. [MKT-9365]
- Pages in Producer Express with groups of checkboxes were rendering poorly when viewed in older versions of Internet Explorer. [MKT-9304]
- The Licensee ID column of the Appointments by Type Details Inquiry in Producer Manager was labeled incorrectly. [MKT-9401]
- On the Carrier Requests page in Producer Manager, the Company select box was not always populating after a user chose a carrier group from the Carrier dropdown menu. [MKT-9442]
- The Producers with Missing Information page in Producer Manager was not listing producers who only had invalid addresses. [MKT-9439]
- When processing an onboarding request with an agent roster in Producer Express, the system was not creating dependent requests correctly if the user changed his or her mind after requesting an addition to the roster. [MKT-9384]
- The Sircon Example California LTC credential program was requiring only the Accident and Health line of authority. The credential program has been updated so that individual licensees that have either an active Accident and Health or Life Only line of authority are eligible. In addition, the Sircon Example Pennsylvania LTC credential program was requiring only the Accident and Health line of authority and has also been updated so that individual licensees that have an active Accident and Health or Life and Fixed Annuities line of authority are eligible. [MKT-9440]

- Some education credential timelines were not being displayed correctly in Producer Manager when a line of authority on a producer's license went from active to inactive. [MKT-9469]
- The Sircon Example California LTC credential program was not working for non-residents. [MKT-9503]
- The Sircon Example California LTC credential program timeline was not being calculated correctly. [MKT-9529]
- The Outbound Data Feed was not properly sending a credential's regulatory body and name. [MKT-9500]